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STATUS OF EAST GERMAN
VULNERABILITY TO AN EMBARGO ON NATO COUNTRIES

CIA/RR EP 63-22 March 1963

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### S-E-C-R-E-T

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#### STATUS OF EAST GERMAN VULNERABILITY TO A WESTERN EMBARGO

In the light of economic developments during 1962, the main conclusions of previous CIA studies of East German vulnerability to a Western embargo (the latest being Section VI of CIA/RR EP 62-13, March 1962) are updated as follows:

- A. General Extent of East German Vulnerability to an Embargo by NATO countries
- l. During the last year there has been on balance no reduction in the vulnerability of the East German economy to a Western embarg. As before, the effects on East Germany of a general NATO embargo would fall chiefly on industries producing for investment and export. The impact would diminish rapidly after the first few months, although there would be some effect on the rate and structure of economic growth for a longer period. From the East German point of view, another undesirable effect would be the added strain on the state and party apparatus, resulting from the enormous administrative job involved in making the necessary readjustments. The intensity and duration of these effects would be less, of course, for a partial or selective embargo, such as one involving only certain items or one imposed on East Germany alone, but the nuisance value would still be considerable.
- 2. During the second half of 1961 the East Germans were able to reduce vulnerability to a Western embargo somewhat by drawing up detailed contingency plans to be implemented in the event of an embargo action by West Germany alone or by NATO as a whole. Because the regime has ceased planning for a Western embargo, however, East German preparedness for such an embargo presumably has declined. Preoccupation with the Berlin crisis has given way to renewed interest in long-term economic growth. The continuation and expansion of trade with the West is assumed in current planning and has a significant role to play in the new long-term plan, which runs until 1970. Although the contingency planning done in 1961 should have taught the East Germans something about what to do in case of an embargo, it is rather unlikely that the 1961 plans themselves would be of much use in 1963. Thus, if East Germany did not get some months advance warning, the immediate impact of an embargo would be somewhat greater than it would have been a year ago.
- 3. There has been little improvement in the ability of East Germany to supply its own requirements from domestic output and trade within the Bloc. Despite a lag in the installation of new rolling mill capacity in 1962, the range of East German steel products improved somewhat. At the same time, however, East German steel requirements have been upgraded to satisfy the demand of machinery producers, who face new problems and stricter specifications from both East German and foreign

customers. In 1962 at least as large a part of East German imports from the West was of special high-grade steels as was true of 1961. The East German desire to introduce new technology also continues to stimulate imports of capital equipment from the West. Inasmuch as vulnerability must be reasured in relation to the requirements of the present (or the future) rather than the past, it is doubtful whether East Germany has succeeded in reducing appreciably its dependence on imports. Similarly, the ability of other Bloc countries to supply East German requirements probably has not increased so rapidly as those countries own requirements for steel and machinery and equipment.

the general state of the East German economy likewise has not changed much for better or worse during the last year. Economic developments in 1962 followed the pattern of 1961, except that the 1962 crops were considerably better than those in 1961, which were the worst in the postwar period. Realistically, the regime expects much the same growth pattern in 1963, with only slow improvement thereafter in rates of growth. To be sure, the hard winter of 1962-63 has affected industrial production and has reduced coal inventories, and the difficult spring which is likely to follow may well complicate agricultural problems. At the moment, therefore, the economy is operating under special strains. East German imports of food and coal from the NATO area, however, do not represent a significant area of vulnerability and supply problems in these areas should be eased in any case by this summer.

### B. Changes in Specific Areas of Vulnerability

#### 1. Importance of Interzonal Trade

Although the share of total NATO exports to East Germany provided by West Germany has been reduced somewhat (to 63% in 1961 and about the same level in 1962), interzonal trade has become an increasingly important source of East German imports of rolled steel. In value terms, West Germany supplied almost 83% of East German imports of steel from NATO countries in 1961 and perhaps even a larger share in 1962. Rolled steel is clearly the most important item exported by West Germany in interzonal trade, constituting 30% of the total value of deliveries to East Germany in 1961.

With the exception of rolled steel, however, East Germany evidently has increased somewhat its purchases from other NATO countries at the expense of the West German market. This shift is particularly evident in East German imports of machinery and equipment; West Germany supplied 72% of NATO shipments in 1961 as compared with 87% in the preceding year. West Germany also is supplying a smaller portion of the

chemicals, crude materials and fuels, and foodstuffs imported by East Germany from the NATO area than was the case in earlier years.

The extent to which East Germany can shift its Western trade away from the West German market continues to be strictly limited, however, by its inability to provide adequate quantities of goods saleable in other West European markets. Brown coal and petroleum, for which there is only a very limited market outside of West Germany, continues to constitute over 40% of East German exports in interzonal trade.

### 2. Rolled steel and metallurgical equipment

During 1962, East German dependence on imports of steel from NATO countries changed very little from 1961. Although preliminary data indicate a slight decline in the share which NATO contributed to total East German supplies of rolled steel, the volume probably approached the level of 1961, when, according to revised estimates, NATO deliveries constituted 9% of the apparent supply and totalled 400,000 tons. Of this amount, about 300,000 tons originated in West Germany. As in 1961, East German steel imports in interzonal trade ran at a low level through the spring and summer of 1962, but heavy purchases during the last quarter brought the level of West German shipments of steel products to approximately the high level of 1961. Imports from the rest of the Free World probably dropped somewhat as a result of the discontinuance of small imports of steel from the United States, Canada, and Japan as well as an apparent decline in imports from France and Austria during 1962. Analysis of the available data on the composition of East German imports of steel from the NATO area indicates that high-quality steel products formed the bulk of such shipments during 1962.

The duration of East Germany's dependence on NATO countries for high-quality steel products is tied largely to the speed with which new domestic rolling and other finishing facilities are installed. There is evidence that this program lost momentum during 1962 as some nearly concluded contracts with West German equipment firms were cancelled and renegotiated with firms in France and possibly in the United Kingdom. A few new facilities capable of producing the products traditionally imported from the NATO area were reported to be nearing the final stages of construction at the end of 1962 and current reports indicate that substantial progress in the priority East German program to install new equipment may well be expected during 1963. Any large scale shift away from NATO suppliers of quality steel products, however, is unlikely in 1963.

West Germany will continue to be the main source of steel imports from the Free World. The East Germans are reportedly having some success in negotiating a 1963 agreement to procure from the United Kingdom substantial amounts of the quality steel products normally obtained from West Germany. In past years, however, British shipments of steel

to East Germany have not exceeded 30,000 tons annually, nor more than about 10% of the level of West German deliveries. Although the East Germans have pursued the current negotiations with the United Kingdom somewhat more vigorously than heretofore, it is unlikely that a substantial diversion of steel imports from West Germany will result when the negotiations are translated into trade contracts. After an apparent failure to obtain long-term credits from the United Kingdom to finance increased imports of steel, final contracts now depend on British agreement to accept East German commodities in payment.

### 3. Coal and coke

Despite a general worsening in the coal supply situation in the Bloc resulting from a combination of production lags and unusually severe weather conditions, the impact of a NATO embargo on shipments of these products to East Germany alone would not be serious. The Bloc alteredy supplies by far the largest portion of East Germany's coal imports and, in the event of an embargo, could fill its remaining requirements either from domestic production or through re-export of supplies obtained from the West.

The NATO area no longer represents an important source of East German imports of coking coal. Although East German requirements for imports of premium-quality coking coal have increased, direct imports from Free World sources of coking coal have dropped significantly in recent years. On the other hand, imports of Western coking coal by other European Satellites have increased markedly as a result of production lags in Greenoslovakia, normally the only Bloc country with an exportable surplus of premium quality coking coal of low-sulfur content. Inasmuch as these countries could expand further their purchases in the West either for diversion to East Germany or to permit increased shipments of domestically produced supplies to East Germany, a NATO embargo on shipments of coking coal to East Germany alone would be ineffective.

many) also have decreased, to 81,000 tons out of a total of 2.84 million tons imported in 1961, and preliminary data indicate a further drop in 1962. Moreover, if necessary, the USSR probably could increase the level of its current supplies to East Germany.

In regard to hard coal for fuel purposes, the severity of the past winter has caused a considerable depletion of reserve stocks as well as the temporary cessation of exports by Poland, the chief supplier of hard coal in intra-Bloc trade. The supply situation should be greatly eased during the summer months ahead but the ability of East Germany, and the other European Satellites dependent upon imports, to rebuild and the other European Satellites dependent upon imports, to rebuild adequate reserves from Bloc sources will be markedly influenced by the success with which Poland and Czechoslovakia can fulfill export obligations while replenishing their own depleted stocks.

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### 4. Foodstuffs

amount to more than one-quarter of the total value of East German imports, were even larger in 1962. Meat imports, in particular, were increased to offset in part the decline in domestic meat production resulting from the extremely poor harvest of 1961. The additional imports came chiefly from the West, and in considerable part from NATO countries (West Germany, Denmark, the Netherlands and France). The bulk of East German food imports comes from Soviet Bloc sources, however, and in the event of a NATO embargo, other Free World countries (such as Sweden and Argentina) could easily supply any additional East German requirements. If necessary, the nutritional requirements of the population could be met and meat consumption probably not greatly reduced even in the event of a total cessation of imports of foodstuffs from the Free World.

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l Free World	513, 202	95,475	72,95h	40,306	70, 483	301,446	126,615	32,538
1 WATO	342,561	69,162	33,202	34,259	58,157	262 6m	8	7,189
Specific of the section of the secti	226,723	15,672	16 TEL The Miles	25,950 (30,950 (30,950	41,821	113,641	91. 14k	2,6,2 2,0,3
Belgium-Luxembourg Denmark	575,51 44,834	20. 20.	2,733	1,471	2,247	4,64	Section of the sectio	38.
France Greece	्र १८०	100 C	\$ 60 C	7 4 2 60 0	\$ <b>%</b>	93 % 3 % 1 m	े <b>६०</b> ज	~ •
celand  Italy	983	896 6	i 15	ာဝ	ာတ်	e No	00	m in
Metherlands	16,85	2,610	in or	# 13,65°F	\$ 8 .i ci	ν, γ. Β. Β.	ले व राज्य	401
cortugal	0 0 0	တိုင် ကိ	<b>880</b>	439	, w.	88	3 0	300
Strkey	4,708	1.677	, }o	ં	<b>)</b>	<b>3</b> 5	<b>O</b>	~ 6
90	27.438	82 55 63 64	080°4	S. C.	3,151	14,176	0) (9 9)	13. K
<u> </u>	1,557	1,391	ì	0	<b>-</b>	8 5	જ જ	<b>&amp;</b> c
See the second of the second o								,

Including reexports. Exports are flot except those from the US, which are flus.s.s.

West German and MANO Imports from East Germany, by Commodity Income at

bolooca Area of Destination  Area of Destination  Area of Destination  Spital Free World  Spital Maro  Chier Maro  Belgium-Luxembourg  Demark  Lichand  France  Greece  Italy  France  France  Britaly  Italy  France  France  Greece  Italy  Italy  Italy  With a countries  Italy  Italy	10 12, 522 112, 562 112, 562 114, 336 115, 535 117, 535 117, 535 117, 535 117, 535 118, 763 118, 763 118, 763 118, 763 118, 763 118, 763 118, 763 118, 763	West German and MATO Food, Beverages and Tobacco and Tobacco 10,962 1,386 1,386 1,386 69 1,386 1,386 1,48 69 1,386 1,48 69 1,48 60 1,48	Crude Materials, Inchinery and Indianation of Toward Transportation and Fuels Tokels Themsportation and Fuels Tokels Toke	76,810 38,082 38,082 38,082 38,082 38,564 20,564 2,878 3,268 2,878 1,1724 2,006 1,152	## # # # # # # # # # # # # # # # # # #		1.550 1.499 1.508 2.277 1.508 900 1.286 3.932 8,036 85 8,036 85 8,036 85 8,036 85 8,036 85 8,036 85 1.147 0	Approved for Release 2000/04/18: CIA-RDP79T01049A0027000
nada Orta are cofofo except thos	2,529 951.	O 13 Dv Canede and the Di	368 368 368 368 368 4 which are f. o. h.	46	1, 221 674 1 <b>24</b>	3,364 1,226 779	95 0	,

West German and MATO Exports to East Germany, by Commodity Groups a

Αŗ	pro	ved	For Religious Miscellane	ase	200 565 721	0/04	18 : CIA	ਮ-RDI ਹੁੰਟ	P79T(	1 Q F			3,395 1,395 1,000	90001-2	2
		Thousand Current US \$	Other Manufactured Goods Of Which: Total Iron and Steel Mi		109,589	SOLI 188	63.005 86.104	6,590	7,743	1,029	484.1	00	2.547		
		Thousand	Other Max	es (S. 1777) - Alling Co. Lander es de la companyation de la companyat	201,770	145,093	101, 132	8,11,9 845	9,204 0	3,000,0	કે જે જે જે	0	12,741	0.00,1	
odity Groups a/			Machinery and Transportation Equipment		77,195	27. 427	7,216	789	2960	395	76 76	> <b>o</b>	3,358	•	
rmenty, by Comm			Chemicala		<b>42,6</b> 73	37,065	89,882 8,183	807.1 13	837	**************************************	914 914	ୁ ଝ	9,624 332 332	0	ů
ATO Exports to East Germany, by Commodity Groups a	1960		Crude Materials, Inedible Materials, and Fuels		77,446	30,145	17,761 12,384	1,340	1,054	367	765	108	97.6 96.		the US, which are f.a.s.
West German and MATO			Food, Beverages and Tobacco and Pats and Olls		945,811	61,624	25, 603 36, 021	1,093 12,482	0.00 4.00 4.00 4.00	466	450,5	4, 131	1,062 1,062	0	Exports are f.o.b. except those from the
			Tota 1	1	530, 228	345,087	228,459	13,078	2, 193	, 6, 6, 6, 6, 6, 6, 6, 6, 6, 6, 6, 6, 6,		6,204	8,49,49,49,49,49,49,49,49,49,49,49,49,49,	1,018	rts are f.o.
Ap	pro	ved	For Rele		Stal Free World	Octal Mato	Swest Germany (including West Berlin) Other NATO countries	7 Belgium-Luxembourg O Dermark	Los dieses				<b>설</b> 옵 '000	Canada 	Lincluding reexports. Expo

S-E-C-R-E-T

West German and MATO Imports from East Germany, by Commodity Groups g

he Thomas de la company de Carlo de La Carlo de						Thou	Thousand Current US \$	
		Food, Beverages	Crude Materials,		Machinery and	Other M	Other Manufactured Goods	
A Area of Destination	Total	and Fets and Oils	Inedible Materials, and Fuels	Chemicals	Transportation Equipment	Total	Of Which: Iron and Steel	S e Miscellaneous
I Free World	548,916	63,875	145,427	75,656	88,386	152,191	13,714	23.381
L NATO	380,755	54,154	130,547	39,049	41,596	99,953	9,770	15,456
A Berlin) Other MATO countries	267,255 113,500	41,840 12,314	121,266	15,788 23,261	20,295 21,301	61,522	636 9,134	6,544 8,912
Belgium-luxembourg Denmark	15,646	719 192	2,788	3,137	1,696	6,125	3,019	3,672
france Greece Testons	7,069	8.50 9.30 9.30	1,404 0	9-1 9-1 8-8-1	1 0, 25,0	, , , , , , , ,	3 100	สรุ
Italy	3,233 14,514	345	1.008	244	1,347	, , , , , , , , , , , , , , , , , , ,	9 ±	
Nerner Lands Norway	8,710 8,805	p, 873 2, 386	2,220 118	2,700	2,981 2,981	6,761	302 305 305	866 1,175
Fortugal. Turkey	7.896 896 896	270	0	<b>.</b> 45	- 60 G	, es	00	<b>3</b>
	17,562	#,021	1,022	θ, <del>μ</del> μι	5,043 579	672 2,196	o *	1,163
์ เรายผล	65 65 76 76 76	) IQ	p a	୍ଷ ଦ	888 1	1,378	00	365

